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Chile

Fresh Deciduous Fruit

Semi-Annual

2003

Approved by:

Christine M. Sloop, Agricultural Attache

U.S. Embassy

Prepared by:

Luis Henniske, Agricultural Specialist

Report Highlights:

Chile's apple and table grape production and export forecasts are up. The increase is mainly due to good quality production together with a strong export demand. Pear production and export forecasts are unchanged at this time.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Semi-Annual Report
Santiago [CI1], CI

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Executive Summary

Chile's supplies of fresh apples and table grapes are expected to be larger in MY2002 (Jan-Dec 2003) than the previous year and our previous forecast, mainly due to better weather conditions in most growing areas. Consequently exports of apples and table grapes are expected to increase relative to our previous forecast. For pears, the production and export forecast remain unchanged at this time.

Fresh Apples

Production

Apple production in volume and quality was much better than previously forecasted in spite of last spring's unstable weather. Rain late in the season together with milder temperatures during summer, had a positive effect on MY2002 (Jan -Dec 2003) apple production. Additionally production has been expanding slowly but steadily during the last few years due to replanting and/or crafting of significant areas with new, higher yielding varieties. A significant number of producers are also increasing planting density in their orchards, which will increase total production in the coming years.

Consumption

There are no official statistics on domestic fresh apple consumption. The figures shown in the PS&D table are estimated as a residual of production, minus apples destined for processing and known exports.

Trade

A larger harvest of good quality apples in MY2002 (Jan-Dec 2003) explains the expansion in export volumes, when compared to the same period last season. In addition, trade sources reported an increased demand by the EU member countries due to the free trade agreement. Apples, began enter the EU market duty free January of this year. The EU is Chile's largest apple export market.

PS&D Table - Fresh Apples

PSD Table						
Country	Chile					
Commodity	Fresh Apples			(HA)(1000 TREES)(MT)		
	2000	Revised	2001	Estimate	2002	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	35400	35400	35090	35090	35000	35700
Area Harvested	33400	33400	30177	30177	30200	30250
Bearing Trees	12459	12459	12490	12490	12500	12520
Non-Bearing Trees	2192	2192	2033	2033	1985	2255
Total Trees	14651	14651	14523	14523	14485	14775
Commercial Production	990000	990000	1000000	1000000	1050000	1080000
Non-Comm. Production	10000	10000	10000	10000	10000	10000
TOTAL Production	1000000	1000000	1010000	1010000	1060000	1090000
TOTAL Imports	60	60	0	0	0	20
TOTAL SUPPLY	1000060	1000060	1010000	1010000	1060000	1090020
Domestic Fresh Consump	90000	90000	110000	110000	130000	130020
Exports, Fresh Only	540516	540516	569000	548194	590000	600000
For Processing	369544	369544	331000	351806	340000	360000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	1000060	1000060	1010000	1010000	1060000	1090020

Export Trade Matrix

(Year 2003 data are for January through June only)

Export Trade Matrix			
Country	Chile		
Commodity	Fresh Apples		
Time period	Jan-Dec	Units:	M.T.
Exports for:	2002		2003
U.S.	63117	U.S.	72599
Others		Others	
Netherlands	59450	Netherlands	70733
Saudi Arabia	41310	Spain	35576
Colombia	44320	Mexico	30132
Ecuador	36746	Saudi Arabia	28677
Spain	32158	Colombia	20680
Mexico	37191	Ecuador	19981
Peru	24094	Italy	18547
U.K.	24770	U.K.	14927
Venezuela	22541	U.A.Emirates	13795
Italy	16795	Russia	13464
Total for Others	339375		266512
Others not Listed	145702		102135
Grand Total	548194		441246

Fresh Table Grapes

Production

Table grape output in MY2002 (Jan-Dec 2003) is expected to exceed slightly the forecasted level, mainly due to good weather in the northern growing areas. Industry sources have indicated that good weather conditions with normal temperatures resulted in a good quality production. The good quality production together with a larger export demand will result in a significant export expansion during this marketing year.

Although it is still early to forecast production for the MY2003 (Jan-Dec 2004), industry sources have indicated that production and export levels are expected to remain at similar levels.

Consumption

As with other Chilean fresh fruits, domestically consumed table grapes are mainly export rejects. There are no official statistics on domestic consumption. Domestic fresh consumption is derived from the only known figure which is exports and the estimated production data. Domestic consumption is estimated to account for about 10 percent of total output, while processing accounts for another 30 percent.

Trade

With the new estimates for a larger total output, table grape exports are now forecast to be higher than earlier projected in MY2002. The U.S. is the largest export market, with close to 60 percent of total shipments destined for that market. Although total trade varies up and down, the market share remains steady.

The duty free trade quota which comes into effect in January 2003 as a result of the agreement signed with the EU, made Chilean grapes more competitive in that market, compared to grapes mainly from South Africa, and an expansion of exports to that market can be observed during this marketing year. This quota will increase yearly, with a phase out of the rather high tariff taking place over the next 3 years.

PS&D Table - Fresh Table Grapes

PSD Table						
Country	Chile					
Commodity	Fresh Table Grapes				(HA)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01/2002		01/2003		01/2004
Area Planted	45383	44000	45300	45383	0	45490
Area Harvested	40700	39500	40300	40700	0	40750
Commercial Production	992000	997000	970000	1060000	0	1015000
Non-Comm. Production	5000	5000	5000	5000	0	5000
TOTAL Production	997000	1002000	975000	1065000	0	1020000
TOTAL Imports	12	12	12	12	0	12
TOTAL SUPPLY	997012	1002012	975012	1065012	0	1020012
Domestic Fresh Consump	99000	99000	99000	115012	0	100012
Exports, Fresh Only	595000	654932	596000	700000	0	670000
For Processing	303012	248080	280012	250000	0	250000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	997012	1002012	975012	1065012	0	1020012

Export Trade Matrix

(Year 2003 data are for January through June only)

Export Trade Matrix			
Country	Chile		
Commodity	Fresh Table Grapes		
Time period	Jan-Dec	Units:	M.T.
Exports for:	2002		2003
U.S.	408221	U.S.	365906
Others		Others	
Netherlands	40600	Netherlands	54286
Mexico	39918	Mexico	41219
U.K.	34716	U.K.	38222
China	23962	Sikkim (India)	18173
Ecuador	9966	Spain	10464
Japan	8809	Ecuador	9682
Spain	7134	So. Korea	9480
Brazil	6711	Japan	9161
Taiwan	6159	Taiwan	9149
So. Korea	5806	Russia	7788
Total for Others	183781		207624
Others not Listed	62930		66291
Grand Total	654932		639821

Fresh Pears

Production

Production forecast is unchanged at this time on Chile's pear production. Although weather has been favorable on the quality of the production, total exports in MY2002 (Jan-Dec 2003) will stay at similar levels then the previous year.

Consumption

As with other Chilean fresh fruits, domestically consumed pears are mainly export rejects. Most of the pears are consumed fresh because only a few existing varieties in Chile can be processed for canned pears or juice concentrates. There is no change in the consumption forecast.

PS&D Table - Fresh Pears

PSD Table						
Country	Chile					
Commodity	Fresh Pears					(HA)(1000 TREES)(MT)
	2000	Revised	2001	Estimate	2002	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	10400	10400	10400	10400	10400	10400
Area Harvested	10100	10100	9900	9900	9950	9950
Bearing Trees	4800	4800	4790	4790	4815	4815
Non-Bearing Trees	140	140	145	145	130	130
Total Trees	4940	4940	4935	4935	4945	4945
Commercial Production	247000	247000	235000	235000	245000	245000
Non-Comm. Production	2000	2000	2000	2000	2000	2000
TOTAL Production	249000	249000	237000	237000	247000	247000
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	249000	249000	237000	237000	247000	247000
Domestic Fresh Consump	69100	69100	68000	66000	68500	68500
Exports, Fresh Only	128900	128900	122000	119445	128500	122000
For Processing	51000	51000	47000	51555	50000	56500
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	249000	249000	237000	237000	247000	247000

Export Trade Matrix

(Year 2003 data are for January through June only)

Export Trade Matrix			
Country	Chile		
Commodity	Fresh Pears		
Time period	Jan-Dec	Units:	M.T.
Exports for:	2002		2003
U.S.	18907	U.S.	25373
Others		Others	
Netherlands	25460	Netherlands	27418
Colombia	9401	Italy	9838
Italy	8565	Colombia	6500
Venezuela	8169	Spain	6153
Russia	6667	Mexico	3604
Peru	6326	Peru	3292
Brazil	6043	Saudi Arabia	2984
Spain	4743	Brazil	2977
Mexico	3941	Portugal	2692
Ecuador	3721	Ecuador	2190
Total for Others	83036		67648
Others not Listed	17502		14119
Grand Total	119445		107140